



WESTON-SUPER-MARE TOWN COUNCIL

Appraisal Policy

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This policy applies to Weston-super-Mare Town Council.

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1. Purpose and Application

1.1 Weston-super-Mare Town Council needs all staff to perform effectively in order to deliver the aims and vision of the Council. To achieve this, the Council aims to ensure that effective recruitment is undertaken, performance expectations and standards are defined through an appraisal framework, performance is monitored and that employees are given appropriate feedback, support and training.

1.2 This policy sets out the framework for a clear and consistent appraisal of the overall performance of staff, and for supporting their development within the context of each provision/ service area and the standards expected.

1.3 It is the Council's aim that the appraisal process will be both developmental and supportive, designed to ensure that staff are able to continue to improve their professional practice. An appraisal will set objectives and provide support so staff have the skills they need to carry out their role effectively and with reference to the appropriate standards and align with the Council's strategies. Appraisal is only one element of the performance management of an individual member of staff. The appraisal process should be seen in this context.

1.4 Information about the arrangements that will apply when it is believed that a staff member's performance falls below the standards that the Council can reasonably expect of them are contained in the Council's Capability Policy and Procedure.

1.5 This policy and the procedures contained within it apply to all staff.

2. The Appraisal Cycle

2.1 The appraisal cycle will run for twelve months from May to April in the following year.

2.2 Each member of staff will be required to attend an Appraisal Meeting and an Interim Review Meeting. Appraisal Meetings will be held between April and May each year and Interim Review Meetings will be held between September and October each year.

2.3 Staff will receive their Appraisal Report as soon as is practicable following their Appraisal Meeting and will have the opportunity to comment on this at the meeting. Staff will receive their written appraisal reports by 31st May, wherever possible

2.4 The Appraisal Report will include:

- An assessment of the appraisee's overall performance of their role and responsibilities;
- An assessment of their achievement of their previously agreed objectives;
- An assessment of their training and development needs and identification of any action that should be taken to address them;
- Details of their agreed future objectives and targets;

- Details of any concerns which have been raised about the appraisee's performance and the steps that have been agreed to address these;

2.5 Staff will receive their Interim Review Report within 3 weeks of their Interim Review Meeting and will have the opportunity to comment in writing on the contents of this.

2.6 The Interim Review Report will include:

- An assessment of the appraisee's progress towards their objectives;
- Details of any agreed amendments or adjustments to their objectives;
- Details of any training or development needs the appraisee has and identification of any action that should be taken to address them;
- Details of any performance assessment which has been undertaken since the Appraisal Meeting and the outcome of such assessment.

3. The Appraisal Meeting

3.1 The Appraiser will contact the Appraisee to advise them of the date, time and location of their appraisal meeting. So far as is reasonably possible, the Appraisee will be given five days' notice of the Appraisal Meeting.

3.2 The appraisal meeting should take place during the Appraisee's normal working time.

3.3 The Appraisee shall complete section one of the appraisal report and provide this to their Appraiser in advance of the Appraisal Meeting. The appraisee's Job Description should also be reviewed to ensure that it is still relevant.

3.4 The Appraisal Meeting will allow an opportunity for both the Appraisee, and the Appraiser to reflect, discuss and comment on the previous year's achievements. It will praise achievement and encourage the Appraisee in their role.

3.5 The Appraiser is accountable for giving the Appraisee constructive, timely and honest appraisals of their performance, which should take into account both the Council's or Teams goals and those of the individual.

3.6 The discussion should be a positive dialogue, and will focus on assisting the Appraisee to acquire the relevant knowledge, skills and competencies to perform their current role to the best of their abilities.

4. Setting Objectives

4.1 The objectives set for each Appraisee will be Specific, Measurable, Achievable, Realistic and Time-bound and will be appropriate to their role and level of experience and will reflect priorities for the appraisee during the appraisal cycle. The number of objectives set should be reasonable and achievable. The Appraiser and Appraisee

will seek to agree the objectives but, if that is not possible, the Appraiser will determine the objectives.

4.2 The objectives set for every member of staff will, if achieved, contribute to the Council's plans for improving the service and performance. Objectives may also specifically relate to the effective deployment and use of resources, administration and organisation.

4.3 The Council or team objectives should reflect published improvement priorities or the Council Strategic Plan(s).

4.4 Though appraisal is an assessment of overall performance, objectives cannot cover the full range of roles/responsibilities. Objectives will, therefore, focus on the priorities for an appraisee during the appraisal cycle.

4.5 The Appraiser will, in their absolute discretion, judge whether objectives set in one appraisal cycle should continue to be relevant in the subsequent appraisal cycle and such a judgement will be recorded in the Appraisal report.

4.6 On occasions during the appraisal cycle, usually as a result of unforeseen circumstances, it may be considered that an objective set at the start of the process is no longer appropriate or requires some adjustment. Either at the Interim Review stage or an additionally scheduled meeting, changes to an objective can be agreed and this should be recorded within appraisal documentation.

5. Reviewing Performance

5.1 The assessment of a staff member's performance should be supported by evidence. Evidence should be sought and collected throughout the Appraisal Cycle and may include training certificates, evidence of e-learning.

5.2 Both the Appraisee and the Appraiser are at liberty to present evidence during the Appraisal Meeting for discussion. In the interests of efficiency and to obtain the best possible value from the Appraisal Meeting, the Appraisee and Appraiser should seek to ensure that any evidence they seek to discuss and/or rely upon is presented at the Appraisal Meeting.

5.3 Staff will receive constructive feedback on their performance as soon as practicable after observation has taken place or other evidence has come to light. Feedback will highlight particular areas of strength as well as any areas that need attention.

5.4 Where there are concerns about any aspects of the employee's performance the employee will be asked to attend a meeting at which:

- they will be given clear feedback about the nature and seriousness of the concerns and the opportunity to comment on and to discuss the concerns;
- there will be discussion, with the aim of seeking to identify and agree what, if any support (e.g. coaching, mentoring, structured or peer observations), will be provided

to help address the concerns;

- it will be agreed when and how the employee's progress will be reviewed;
- the employee will be made aware of the implications for them and the procedures that will apply should improvement not reasonably be achieved or sustained within the timeframes that have been agreed. Following the meeting, the employee will receive written confirmation of the discussions held and the agreements reached during the meeting.

5.5 An employee who is requested to attend a meeting to discuss their performance may request that they are accompanied to the meeting by a work colleague. Such a request will be granted unless it is not reasonably practicable for the chosen colleague to attend.

5.6 Pay Progression

All staff will automatically progress through their scale point detailed within their contract as per the terms and conditions of the National Terms and Conditions. Any additional recommendations for pay increase/regrading will be assessed by the CEO/Town Clerk and form part of the staffing review. Decisions about whether or not to accept a pay recommendation will be made by the Personnel Committee.

The measures that will be considered in making judgments about whether members of the leadership team have met their objectives and the standards will include the whole Council contribution / impact they have made, specifically their:

- effectiveness in leading, managing and developing the Council;
- contribution to Council strategy / planning;
- impact on Council objectives;
- impact on Council improvement;
- wider contribution to the work of the Council and to the community;
- contribution to effective working with other agencies.

Where appropriate, objectives will be longer term (over two or more years) to link to long term Council improvement but will in that case incorporate intermediate (annual) objectives.

The Council will agree objectives appropriate to their role.

6. Development and support

6.1 Appraisal is a developmental and supportive process which will be used to inform continuing professional and personal development and improvement. The Council wishes to encourage a culture in which all staff take responsibility for improving their performance through appropriate professional and personal development. Professional development will be linked to improvement priorities and to the ongoing professional development needs and priorities of individuals and teams.

6.2 As such, a Council Training and Development programme will be informed by the development needs identified in the Appraisee's Appraisal Report.

6.3 Appropriate but affordable resources available to support staff development arising from the appraisal process. The Director of Finance and Resources will report, as required, to the Personnel Committee each year on CPD activities.

6.4 Where CPD is identified as key to the improvement of an individual, they should not be held responsible for lack of progress against agreed priorities if the resources are not forthcoming/have not been provided.

7. Retention of Documents

7.1 Appraisal documentation will be retained and held securely in accordance with the Council Data Protection Retention Policy and will thereafter be destroyed.

8. Monitoring and Evaluation

8.1 The Council is committed to ensuring that the appraisal process is fair and non-discriminatory. The CEO/Town Clerk should assess the impact of the process and of performance objectives to ensure that they do not represent possible grounds for unlawful discrimination in regard to any of the relevant protected characteristics under the Equality Act 2010, part-time work, fixed-term contracts or trade union membership. This will be done following advice from the Council's designated legal Indemnity Holder (external WorkNest)

8.2 The Director of Finance and Resources should, therefore, also report annually to the CEO/Town Clerk, in a confidential section, appropriate

details of:

- Any appeals or representations on an individual or collective basis on the grounds of alleged discrimination under any of the categories above in relation to appraisal.
- Cases, including the circumstances, where staff have not made satisfactory progress towards objectives.
- Any instances where the training and development set out in the training and development annex of an appraisal has not been provided.
- Numbers who have fully achieved objectives.
- Number who have partially achieved objectives but with acceptable reasons.
- Number who have partially achieved objectives but with unacceptable reasons.
- Number who have not achieved their objectives.

9. Policy Review

This policy is reviewed by the Council annually and where materially amended is consulted on, where necessary. The Council will monitor the application and outcomes of this policy to ensure it is working effectively.